



vol. 1 from marke2ing's  
“how2”ebook series:

# 7 steps to confident. fret-free insourcing

Your guide to making sure you choose the right  
marketing suppliers for your in-house needs.

marke2ing  
for your growth

# table of contents

- intro: Choose the right marketing suppliers
- step 1: Know what you want and brief it
- step 2: Be clear about your budget and timeframe
- step 3: Know who you're looking for
- step 4: Immerse them in your world
- step 5: Set crystal clear expectations
- step 6: Tie them in
- step 7: Seize the day and keep an open mind

**marke2ing**  
for your growth

# introduction



You've identified the need for work that, for whatever reason (lack of resource, time, skills...), you can't carry out in-house. You know you have outside options to consider, but what are they and how do you end up with a result you're happy with?

Contracting in or "insourcing" experienced people – whether agency, freelancer, or contractor - to support specialist projects, is seen by many as a far more attractive alternative to taking on the responsibility of managing and delivering that same work in-house, without having the necessary internal support infrastructure. The responsibility of sourcing, briefing and managing your chosen supplier does however lie with you.

So, follow these 7 steps for a confident, fret-free experience...

**marke2ing**  
for your growth

# step 1

## know what you want and develop a watertight brief

**So where do you start? Kick off by defining your objectives, as this is key to developing a clear, succinct brief. If you start here, you can then ensure everything else that follows is aligned with these goals.**

- You don't have to know all the answers – otherwise you probably wouldn't be looking to insource support and inspiration. But you do need to know what your end goal is.
- Putting time into your brief development will not only save you time in assessing the responses, but will help you quickly see who's understood what you want and how they can help you get there.
- If briefing really isn't your thing, or is simply not something you can devote enough time to, you can always develop a brief with a supplier – but expect that to come with a price tag.
- Finally, ask yourself - how will you know if you've succeeded or not? If you don't have the means of tracking the activity you're investing in, maybe you should take a step back and consider whether you're still comfortable making this investment of budget, time and resource without being able to confidently report tangible results.

**define your objectives and know how you'll track them**

**marke2ing**  
for your growth

## step 2

# be clear about your budget and timeframe

**No one likes a nasty shock when they see the price tag attached to a proposal. Taking time to understand how the support you need equates to budget and how different suppliers price themselves will ensure you don't fall off the chair when your potential supplier reveals their fees.**

- Allocate dedicated budget for this piece of work. It can be challenging to come up with a figure when you don't yet know the full scale of work required, but think about what you can comfortably afford, and how that fits in with your overall annual budget.
- Look for flexibility and a little give in your budget to help you do this. What can be reallocated? Can anything be pushed back to the next financial year? Can you shave spend off any other areas?
- Understand the different cost implications associated with an agency versus a freelancer versus a contractor. Each offers a different service with its own price tag.
- Assessing whether a supplier can meet your needs, in time, means you need to know what deadline you're working towards. Be clear about what you want delivered, and by when, so that you can determine whether a supplier has the resource and flexibility to get you there.
- For larger scale projects consider taking a phased approach to help break it down into manageable chunks of work, each with a clear set of underlying tasks and delivery date.

**marke2ing**  
for your growth

**know your  
budget and  
understand  
supplier fees**

## step 3

# know who you're looking for

**Speed has become a vital competitive advantage. In an ideal world, we'd all have sufficient time to invest in thorough planning, implementation, careful reviewing and then going back to further improve on what we've done. Alas, in the real world where markets transform overnight, objectives change and deadlines are brought forward, time – one of our most precious resources – can end up being the one that's most scarce. But putting in time at the start to research potential suppliers will save time in the long run.**

- Take some time to look around. There are significant differences between what an agency, freelance and contractor will each offer. Know the advantages and disadvantages of each, and what that translates to in financial terms.
- With so many supplier options out there, it's difficult to provide one all-encompassing definition of each. But as a rough rule of thumb:
  - › An agency will be off-site, and will charge a project or a retainer fee. They may offer a range of creative services such as brand development and design, campaign development and implementation, marketing strategy and planning – but with an outside perspective.
  - › A freelancer may work on or offsite, charging a project or retainer fee. Without the infrastructure of an agency a freelancer typically supports smaller projects as they will specialise in fewer areas (i.e. graphic/web design, copywriting, planning, research...).
  - › A contractor will have outside experience, may work on or offsite and will charge a project fee. They'll typically pose a project-specific skill set and as with the freelancer, will not have the agency infrastructure supporting them.

**marke2ing**  
for your growth

## step 3

# know who you're looking for (continued)

- If you've not done so already, seek out positive recommendations from peers, online forums, LinkedIn etc. and look for credible references and examples of previous work.
- Finding a combination of in-house management experience, concept development, creativity and resource is a challenge – but not out of reach\*.
- When you're at the stage of talking to potential suppliers, consider how thoroughly they question you. Rate them by the quality of their questions and understanding, and the care they take in finding out what it is you want.

**research your options and  
seek solid recommendations**

\* If you've looked into working with agencies, freelancers or contractors but are concerned about the lack of in-house experience then take a closer look at us. Marke2ing offers director level, in-house marketing expertise, without the agency price tag. Working with us also gives you access to our tried and tested network of fast, reliable suppliers – saving you even more of the guesswork.

**marke2ing**  
for your growth

## step 4

# immerse them in your world

**You've found someone you want to work with. That's a major hurdle overcome. It's now up to you to help get them up to speed. Time spent sharing your knowledge with them is a worthwhile investment.**

- The more they understand about your challenges, your business and your clients the better they'll be at advising you on the best course of action and implementing it efficiently.
- Equally, your supplier should care enough to want to understand that level of detail, and should take you through a thorough questioning process themselves.
- Trust is built from a shared understanding and mutual respect, and is the glue that holds all relationships together - including the relationship between you and your supplier.

**marke2ing**  
for your growth

**share your knowledge and  
build up trust**



## step 5

# set crystal clear expectations

**You've developed a plan with your supplier and now need to develop a clear work schedule, built around your key goals and deadlines.**

- Decide who's responsible for doing what, and by when. Remember, one thing you cannot outsource is responsibility – you too will have responsibility for reviewing plans and materials, on time, along the way.
- Be proactive. Plug in regular, open communications and progress reports so that you're reviewing every step along the way.
- A supplier worth their salt will challenge you. For example, you might think your website – perhaps your most visible route to market – is where time, resource and budget needs to be invested in. But there may be alternative channels your supplier has experience of that your business could benefit from.

**marke2ing**  
for your growth

**develop a clear work schedule  
with open communications**

## step 6

## tie them in

**Have you firmed up what results you expect your supplier to deliver?**

- Expect to see an outline of the results they'll deliver (provided you or they have the tools and processes to measure this activity - otherwise it might be wise to consider developing tools). They should confidently propose a set of results to expect, indicating a timeframe within which they'll be achieved.
- For projects which are easily measurable and where you have benchmarks you can be confident in (e.g. email campaign where audience response rates are known) consider payment-by-results (i.e. if achievable targets are hit, your supplier receives 100% of their fee). And as an added incentive, you could consider offering a bonus if they exceed these results by a certain %.
- Remember that marketing ROI cannot always be measured in financial terms. Your supplier may pinpoint a variety of success factors such as the "buzz" via social online media, and subsequent traffic to your website; quality engagement with key media contacts, blogs or forum members; greater evidence of seeing your key spokespeople out there and so on.

**know how you'll  
measure success**

**marke2ing**  
for your growth

## step 7

# seize the day and keep an open mind

**Bringing in the right support will mean new opportunities are open to you – make sure you think them through and don't miss out.**

- With your supplier now supporting you, you should find yourself with more time to breathe and think about what's next. What new ideas have you been meaning to further flesh out in-house and maybe even test in the market?
- As markets move so fast, it's important that your marketing keeps up, which is why testing new channels and concepts and refining your approach is vital to staying fresh, relevant and engaging.
- Innovating and testing doesn't always require budget. New messages, propositions and promotions can be easily tested online via your website, social media platforms, forums and other channels. Why not take some of your most loyal clients out to lunch, and run some ideas past them. Or spend some time with your customers at your POS - that's been on your to-do list for a while anyway, hasn't it?
- Be open to your suppliers' suggestions as it might just be that their new angle gives you that extra competitive edge.
- Get out there and have fun. Take that extra time to be inspired – go to that conference you didn't think you'd have time for, the design exhibition that's received rave reviews... whatever it is that keeps your creative juices flowing. It's oh so easy to get stuck in that day-to-day work routine without stopping to take a look around and see what's going on out there.

**marke2ing**  
for your growth

**be open to new ideas  
and to innovating**

# find further inspiration on [marke2ing.com](http://marke2ing.com) / getinspired

Have you found this “how2” ebook (born 20<sup>th</sup> Oct 2011) useful? Any feedback, comments, ideas,... are very welcome: [linsay.duncan@marke2ing.com](mailto:linsay.duncan@marke2ing.com).

Subscribe to [Marke2ing's RSS feed](#) to read about new ebooks, templates, tools and more first!

**marke2ing**  
for your growth



## about the author

w: [marke2ing.com/linsay](http://marke2ing.com/linsay)

t: [twitter/linsayduncan](https://twitter.com/linsayduncan)

## copyright info

The copyright of this work belongs to Marke2ing Ltd.

This work is licensed under the Creative Commons Attribution-NonCommercial-ShareAlike license. To view a copy of this license, visit [Creative Commons](http://creativecommons.org/licenses/by-nc-sa/4.0/).

## feel free to share, post, print it and more

You can also adapt this content as long as you attribute it to Marke2ing Ltd, share it under the same or a similar license. No commercial use. To view the human-readable license, visit [CC License Deed](#).